

## Review Template for Practice Manager

*Instructions:* For multirater reviews, have all reviewers complete Section 1. The manager will collect all review forms and then complete Section 2. For a single-rater review, the reviewer completes the entire form.

Team Member Name \_\_\_\_\_

Evaluation Period \_\_\_\_\_ Due Date \_\_\_\_\_

### SECTION 1

<b>Client Relations</b>	<b>MEETS EXPECTATIONS</b>	<b>DOES NOT MEET EXPECTATIONS</b>
Clients respond positively to team member		
Effectively manages distressed clients		
Deals with clients quickly and efficiently		
Effectively educates clients		
Has good phone manner and skills		

<b>Knowledge Base</b>	<b>MEETS EXPECTATIONS</b>	<b>DOES NOT MEET EXPECTATIONS</b>
Knows basic medical problems and terminology		
Knows practice policies and procedures		
Is proficient in computer skills		
Has desire to learn		

<b>Teamwork</b>	<b>MEETS EXPECTATIONS</b>	<b>DOES NOT MEET EXPECTATIONS</b>
Has a good attitude		
Cooperates		
Does not avoid any aspect of job		
Supports other team members		

<b>Personal Skills</b>	<b>MEETS EXPECTATIONS</b>	<b>DOES NOT MEET EXPECTATIONS</b>
Communicates effectively		
Is efficient, productive, and accurate		
Is punctual and dependable		
Maintains composure		
Is responsive to feedback		
Takes initiative		
Exercises good judgment		
Can multitask		
Maintains a professional, presentable appearance		
Follows instructions		

<b>Office Management</b>	<b>MEETS EXPECTATIONS</b>	<b>DOES NOT MEET EXPECTATIONS</b>
Maintains a clean working environment		
Accurately maintains records		
Effectively manages accounts and payroll		
Effectively maintains office and computer equipment and systems		
Implements successful office procedures		

<b>Practice Management</b>	<b>MEETS EXPECTATIONS</b>	<b>DOES NOT MEET EXPECTATIONS</b>
Successfully instructs, supervises, and directs technical and support staff		
Makes hiring and disciplinary decisions that support the team and enhance profitability		
Implements policies that support the practice's mission and profitability		
Creates work schedules that enhance profitability		
Makes purchasing, insurance, and maintenance decisions that maintain and protect the practice at the highest level while increasing profitability		
Implements successful operating procedures to maintain security and enhance profitability		
Implements marketing strategies that increase clientele and profitability		
Investigates complaints and effectively mediates		

**Name Three Goals to Work Toward**

<b>NAME OF GOAL</b>	<b>PERFORMANCE/METRIC</b>

**Comments**

- Offer positive and negative examples of performance.
- Offer examples of character and teamwork.
- How is this team member a role model for others?
- What areas of development do you recommend?

**SECTION 2**

**Goals for Last Period**

NAME OF GOAL	RELATED ACCOMPLISHMENTS	GOAL COMPLETED? (YES/NO)

**Summary**

Attendance satisfactory? YES NO

Overall evaluation of team member's performance based on all responses:

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Team member's strengths:

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Areas that need to be addressed or improved for team member to continue in current position:

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## Development Goals

NAME OF GOAL	ACTION ITEMS	PERFORMANCE/ METRIC	ACCOMPLISH BY DATE

Next Review Date \_\_\_\_\_

Signature of team member indicates receipt of appraisal. It does not necessarily indicate agreement.

\_\_\_\_\_  
Team Member Signature      Date

\_\_\_\_\_  
Supervisor Signature      Date